

SYSTEMISE YOUR BUSINESS

A COMPLETE GUIDE TO SYSTEMS AND AUTOMATION

HELPING YOU BUILD A SCALABLE,
PROFITABLE BUSINESS



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WHY DO I NEED SYSTEMS?

Systems will literally make your business transparent, allowing you to clearly see the root cause of problems and their obvious solutions. Quickly eliminate customer complaints, operational waste, mediocre performance, worker turnover, unnecessary costs, poor cash flow, slow sales growth, small profit margins, and daily frustration.

Think to yourself each time you complete a task, 'Will I have to do this task again? If yes, build a system.' The time taken to create a record of the processes and procedures will save endless time and resources later down the track.

Three reasons why business systems lead to success:

1. *Consistency* – a procedure or process that can be followed by every member of staff and without risking misinterpreted word of mouth explanations. The individual who is in charge of that task has written the system, therefore the process is tested to achieve the desired outcome.
2. *Team Empowerment* – Mundane and repetitive tasks can be automated through systems and achieved efficiently, saving up time and resources to focus on more rewarding tasks.
3. *Employee Productivity* – This will also help to improve your employees' performance and productivity, by allowing them to complete their tasks faster and more effectively.

Without business systems, you don't own a business – you ARE the business. If you want to double revenue, you need to double the hours you work. Since you only have so many hours in a day, that limits how fast and how big you grow. By automating, delegating, and systemising your business activities and business functions, you gain leverage, which is the key to creating and scaling a high growth organisation."



10 BENEFITS TO AUTOMATING AND SYSTEMISING YOUR BUSINESS

**1**

INTEGRATE NEW HIRES INTO YOUR TEAM WITH EASE

Whether you work virtually with an outsourcing partner or have in-house employees, procedures help new team members to get up to speed quickly with no negative impact on your business (and no huge time resource required from other team members training them). Induction is a critical part of any company, why not systemise (and automate) it?

2

YOUR CLIENTS LOVE SYSTEMS!

If you've developed systems across your marketing and customer service they'll feel pretty impressed, not to mention important and valued! Customer complaints are resolved quickly, marketing is used effectively to engage with and attract ideal clients, service is consistently high, no matter which team member they are interacting with, in short, your clients know what to expect from you ... a consistent, high level of service.

3

REDUCE COSTS

Repeating the same task leads to inconsistencies, quality issues and cost. Systemisation includes using templates and automation to replace manually repeated tasks. *For example, instead of repeatedly drafting new email replies to frequently asked questions, set up an email template linking to an FAQ page on your site triggered by an inbox rule driven by keywords in the subject line. The template can still be personalised but you're not re-inventing the wheel every time. Or respond to Facebook messages using a chatbot (i.e. ManyChat). These automated tools save time (saving costs) while improving your customers' experience.*

4

DOCUMENTING A PROCESS HELPS YOU THINK IT THROUGH (AND IMPROVE IT)

When you focus on one activity for a period of time you're able to look at it with new eyes, seeing inefficiencies you can improve on.

5

SYSTEMS HELP YOU SEE WHERE THE PROCESSES FIT TOGETHER

Documenting all parts of your business will help you and your team see the bigger picture. *What happens if you skip this process and go straight to x? What happens if each month marketing sends accounts a link to this month's landing page to go on your invoices?* By working as a team, you improve results.

6

SYSTEMS TRANSFORM A 'JOB' INTO A BUSINESS

By moving IP from inside your head into a documented system 'you' are no longer your company. Well organised systems give you the freedom to move from 'working in' the business to 'working on' the business, meaning you can improve your work-life balance while spending more time on higher value-add activities.

7

IMPROVE THE VALUE OF YOUR BUSINESS

Whether or not you have an exit plan in place, having systemised your business dramatically improves its value. Anyone purchasing your business knows it will run smoothly (without you!) after acquisition.

8

SYSTEMS IMPROVE CONSISTENCY OF QUALITY ACROSS YOUR BUSINESS

Having systems for your business results in a consistency of performance no matter who performs the task or when the task is carried out. Continuous review of processes ensures quality is the same or better each time the task is performed.

9

YOUR BUSINESS WILL BE IN A STATE OF CONSTANT IMPROVEMENT

As you develop your business systems you'll incorporate quality control, feedback and review across your business. This helps to highlight problems as they occur and monitor your business, technology and industry for change. A business fully systemised with automated processes is flexible, proactive, reactive, efficient and productive, and should be a leader in its industry.

10

IMPROVE CONVERSION OF NEW CLIENTS

In using systems (and automation) as part of your conversion and onboarding processes you'll increase conversion from prospect to client. Fact! We've seen a dramatic improvement since implementing (and split testing) our own processes.

PLANNING YOUR SYSTEMS



By taking time to plan now you'll save time in the future and have a clear goal to work towards. That goal being to create systems for your business to prepare it for the future, while increasing productivity and profitability today. No time like the present! Before you even put pen to paper (or fingers to keyboard) there's a couple of questions to ask yourself and your team.



HOW ARE YOU GOING TO USE YOUR SYSTEMS?

Systems quickly lose their value if filed and forgotten. Work them into your day to day routines so they remain current. We'll discuss in this guide how to keep your systems up to date, but as an example we refer directly to SOPs from our project management template tasks.



HOW WILL YOU DECIDE ACCESS?

Some businesses have areas of their SOPs available to clients as a resource. Some examples may be access to templates they use on a regular basis, resources you refer them to, or examples of your SOPs they can use in their own business. Other businesses prefer to keep internal and external processes in completely separate systems as a quality control.

Internally, consider the hierarchy of your organisation. For a larger business you may want every member of your sales team to have access to all sales processes. But you may not want them having access to finance procedures. For businesses working with virtual staff we suggest they have access only to the procedures for tasks they're responsible for.



WHERE WILL YOUR SYSTEMS LIVE?

If you can, use something your team is familiar with and will be confident using – it should be accessible across devices and secure. We use Google Drive for both our own systems and those we document for clients. This is our 'library' and reference point and as such is version controlled and audited regularly.



ACTION: CREATE YOUR PLAN

DOCUMENT YOUR PLAN IN A PROJECT BRIEF

When helping clients with their business systems we use a project brief template ensuring we have key information outlined at the start of the project. This ensures everyone working in the project is on the same page.

Complete this template for your project systemisation and upload it into your project management system or a shared space your team can easily access.

This is a living document and you'll find you edit it constantly as you work through this project. Use it for your team meetings to measure and review progress.

Project Information

Project Name: (Business Systems)

Project No: (if applicable)

Date: (Start/End Date)

Project Mgr: (Your Name)

Key Dates: (Estimated Completion (dd.mm. yy))

PROJECT BRIEF

OVERVIEW
Use this section to clearly explain the scope of this project.

DESIRED OUTCOME
What are the desired outcomes or goals on the completion of this project?
What do you need to achieve?

PROJECT INFORMATION
Include the detail and steps needed to do the project. We suggest breaking the project into the steps shown in the guide:

Step 1: Why are we automating and optimising our business (benefits to your business)
(Insert notes for this step)

Step 2: Planning our business systems
(Insert notes for this step)

Step 3: Setup and implementation of our systems and processes
(Insert notes for this step)

Step 4: Reviewing and auditing our systems
(Insert notes for this step)

PROJECT MILESTONES

Date: Milestone:

HOW WILL WE MEASURE SUCCESS?
Go back to your desired outcome, we have KPIs to measure the success of this project. Think about the benefits to your business of setting up your systems, how can you measure them? Examples are:

- Mistakes cost
- Customer satisfaction (use premium score on Customer Feedback survey)
- Customer compliance
- Increased lead conversion (because you have a procedure in place to follow up on their role using proposal templates)
- Team satisfaction (processes are quicker, more efficient)



YOUR CORE PROCESSES



AS A SMALL BUSINESS IN START UP PHASE WILL HAVE THE FOLLOWING FOUR CORE PROCESSES:

- Customer Strategy & Relationships (Marketing)
- Employee Development & Satisfaction
- Quality, Process Improvement & Change Management
- Financial Analysis, Reporting, & Capital Management

AS YOU REACH YOUR GROWTH PHASE YOU'LL START TO DEVELOP THE FOLLOWING:

- Management Responsibility
- Customer Acquisition (Sales)
- Product/Service Development
- Product/Service Delivery
- Accounting Management
- Technology Management

ACTION: DOCUMENT YOUR CORE PROCESSES

Download this SOP Master spreadsheet where we've made a start for you by documenting the most common core processes. We've also populated it with some examples of our own procedures.

Over the next month, add each activity, task and project you and your team work on as a sub-process in the relevant column (1 row per sub-process). This spreadsheet forms the foundation of your business system.

As you and your team populate the spreadsheet, make notes on desired outcomes, tools/apps/software used, quality control and feedback, measurements, critical factors (risk prevention), strengths and weaknesses.

Refer back to these notes as you start the next part of your business systems: the documentation.

| 1 | Link to SOP | Customer Strategy & Relationships (marketing) | Team Development & Satisfaction | Quality, Process Improvement & Change Management | Financial Analysis, Reporting & Capital Management | Management Responsibility | Customer Acquisition |
|----|-------------|---|---------------------------------|--|--|---------------------------|-------------------------|
| 2 | | Messenger campaign for lead magnet | Team member induction process | | | | |
| 3 | | | | | | | |
| 4 | | | | | | | |
| 5 | | | | | | | |
| 6 | | | | | | | New prospect |
| 7 | | | | | | | New client onboarding p |
| 8 | | | Lead VA expectations | | | | |
| 9 | | | Bi-monthly team meeting | | | | |
| 10 | | | | | | | |
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DOCUMENTING YOUR BUSINESS SYSTEMS



Now it's time to fill in the gaps and cement that foundation we started to build.

- You now have your project brief.
- You now have your processes documented in your SOP Master Spreadsheet

What you don't have is the documentation to back up those processes. Time to roll your sleeves up!

Open your SOP Master Spreadsheet again, now we want you to add some columns (see columns L to Q in our example):

- Priority (how critical is this process to your business)
- SOP Stage (standard operating procedure – in progress, testing, completed, reviewed)
- AOR (area of responsibility – who is creating the SOP)
- Creation date (when was the SOP created)
- Tested date
- Review date (we recommend quarterly but this may change depending on the priority of the SOP)

STANDARD OPERATING PROCEDURES [SOPS]

Documenting your SOPs, while having the obvious benefit of documenting IP in your business, also helps to improve how efficient, effective and productive your processes are.

The very act of videoing, screenshots or writing how you do what you do means you and your team think about what, how and why you do it.

HOW TO DOCUMENT YOUR SOPS

1. Next time you do the actual task you're creating a standard operating procedure for, [open your SOP template](#) and save in your SOP library.
2. Link to this doc from your master process spreadsheet.
3. Fill out the SOP as you're doing the task. You want anyone in your organisation (with the required skillset) to be able to complete this task by following the SOP. Use a mixture of text, screenshots and video to document instructions.
4. Once completed, update status in your SOP tracking sheet and move to testing.



CLICK HERE
to read our article on
how to document
procedures quickly
using video

TESTING YOUR SOPS



A procedure has no value if it cannot be used by members of your organisation to perform a task or process. Testing ensures the SOP is clear, accurate, and has all relevant information needed to be a complete SOP.

HOW TO TEST YOUR PROCEDURES

1. Identify a team member who can review the procedure, preferably someone not familiar with the task.
2. Ask them to perform the task by following the SOP.
3. Get feedback on any areas of weakness or confusion.
4. Update where needed.
5. Update version control details with date of testing/approval.
6. Update the status in your SOP tracking sheet.

REVIEWING YOUR SYSTEMS

SYSTEM REVIEW CHECKLIST

| | YES | NO | |
|---|-----|----|--|
| Can the task be performed using the SOP independently of individuals (assuming skill level is consistent) | | | |
| Is the SOP up to date? | | | |
| Is there a manual or routine function within the SOP that could be automated? | | | |
| Are all hyperlinks working correctly? | | | |
| Is there a quality control and feedback element to the SOP? | | | |
| Is this process being measured and reported? | | | |
| Is best practice being followed for the SOP? | | | |
| Is the SOP followed by all (being used by your team)? | | | |
| Are there multiple versions of the SOP in various locations (document control)? | | | |
| Is the SOP accessible? | | | |

A BEGINNER'S GUIDE TO AUTOMATION

1

IDENTIFY TASKS THAT ARE REPETITIVE AND CONSUME THE MOST TIME

The key to getting started with automation is to first identify the tasks that are eating up your time. Analyse these tasks to see if they are repetitive or have a pattern to automate. *For example, let's say you're a support lead and you need to monitor the performance of your support executives. A cumulative weekly report of the number of support tickets closed by every support executive that week would help you study your team performance better.* This is a task that can be automated.

2

CHECK IF/HOW IT CAN BE AUTOMATED

Now that you know what task has to be automated, the next step is to find out how you can automate it. *You could set up an automation in your help desk software for a weekly report to be delivered to your inbox, or you could bring all the details from your help desk into a widget inside your communication app.* Pick the method that will help you use the automation to its fullest potential.

3

FIND THE RIGHT TOOL FOR THE AUTOMATION

Once you've decided what to automate and how you want it automated, you need to find the right automation tool to help implement it. A good collaboration application will offer workflow automation features. This will help you integrate your collaboration app with other external applications you use on a daily basis. You can either set up workflow automation to bring data from other apps inside your collaboration app or push data from your collaboration app into other integrated external apps.

4

SET UP THE AUTOMATION AND TEST

Automation replaces manual tasks so you and your team can spend your time more efficiently. More time in your zone of genius!

One word of caution is to continually test automation. Zaps, triggers, links all break from time to time which will impact your business.

As you set up automations, we suggest creating a checklist. Assign this (and build it into your procedures) to a team member who will be responsible for continually testing all automation.

JUST A FEW EXAMPLES MANUAL TASKS YOU CAN AUTOMATE

- Reconcile your accounts in Xero faster using rules.
- Schedule your social media posts from Canva (premium account).
- Capture leads from your landing page into Mailchimp using Zapier.
- Email a subscriber who clicks on a link in your newsletter with Hubspot.
- Use ManyChat to create messenger bots.
- Integrate Slack with ClickUp to transfer slack messages to tasks automatically

OUTSOURCING

VIRTUAL ASSISTANCE

A virtual assistant will be able to assist you with:

- Documenting the tasks they are responsible for in SOPs
- Reviewing and testing your procedures
- Implementing automation of your manual processes

VIRTUAL BUSINESS MANAGEMENT

A virtual business manager will be able to assist you with:

- A complete review of your business systems
- Working with your team to assist with documentation
- Project manage the systemisation and automation of your operations
- Ensuring your systems are 'followed by all'

You'll be able to delegate aspects of this guide to your VA. A VBM would manage the entire process for you.

CONCLUSION

A woman with long blonde hair is sitting on a light-colored sofa. She is wearing a white top and a light pink shawl. She is holding a white coffee cup with both hands and looking off to the side with a slight smile. A tablet is resting on her lap. The background is a blurred indoor setting with green plants and a lamp.

YOU SHOULD BY NOW ...

1. Understand (and believe!) the benefits of business systemisation.
2. Have planned your own business system.
3. Starting documenting your SOPs.
4. Have a process for continuous review and improvement of your business systems.
5. As new technology, automation, industry advances, customer needs and opportunities arise, you are now in the best possible place to take advantage of change.
6. Your organisation is prepared for sustainable growth with a strong foundation on which to scale.

HOW CAN WE HELP YOU?

DISCOVER HOW WE CAN MAKE
SYSTEMISING & AUTOMATING YOUR BUSINESS
EASY FOR YOU

[BOOK A DISCOVERY CALL](#)

If you're looking at fast-tracking the automation and systemising of your business you're at the right place.

We will work with you and your team to plan, document, test and review your systems.

We've done this before (once or twice) so we know what works and what doesn't.

It's called keeping you working in your zone of genius, while we work in ours.

